

## Automation & AI Diagnostic Report

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### Executive Summary

Based on the details provided, we reviewed the current technology stack and noted key bottlenecks.

Current Stack: HubSpot CRM, Xero, Shopify, Google Sheets

Bottlenecks: Manual invoice entry, duplicate data in CRM, inconsistent booking confirmations

Our analysis identified opportunities where automation and AI can reduce manual work, improve accuracy, and free your team for higher-value tasks. This diagnostic highlights three automation quick wins, AI opportunities, a phased roadmap, and important risks & considerations.

### Quick Wins

Workflow	Current Challenge	Automation Opportunity	Impact
CRM ↔ Finance	CRM ↔ Finance Manual double-entry between HubSpot and Xero	Automate syncing of new deals/invoices to Xero	Save 5 hrs/week
Client Booking	Staff send manual booking confirmations	Automated booking emails & calendar invites	Save 2 hrs/week
Reporting	Monthly sales reports are compiled manually	Automated dashboards pulling live data	Reduce errors, save 3 hrs/month

### AI Opportunities

- **AI Drafting:** Use GPT to auto-draft client proposals and contracts from form inputs.

- **Data Enrichment:** AI can enrich CRM records with missing details (job title, company size).
- **Document Processing:** AI can scan invoices/contracts and feed key data directly into CRM/finance systems.

## Recommended Roadmap

Phase	Actions	Timeline
Week 1	Implement CRM ↔ Xero sync	Immediate
Week 2	Set up automated booking emails & reminders	Short term
Weeks 3 - 4	Deploy AI-driven proposal drafting pilot	Medium term

## Risks & Considerations

- **Data Accuracy:** Automation is only as good as the data feeding it. Inconsistent CRM entries could reduce reliability.
- **Change Management:** Staff may need training to adapt to new workflows and trust automated processes.
- **Integration Limits:** Certain legacy tools may not support direct API integration, requiring workarounds.
- **Compliance:** Ensure GDPR compliance, particularly when using AI for data enrichment and document processing.
- **Scalability:** Start small, then expand. Over-automating without proper governance may create complexity.

## Next Steps

To get the most from these opportunities, we recommend a short review call where we can walk you through the roadmap, demonstrate example automations, and prioritise based on your business goals.

Book your review here: [Insert Calendly Link].